beta

fdms.gov

Your Agency's Docket Management System

FDMS Version 4.4
Release Notes

Release Date: June 15, 2013

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★ E·GOV

Contents

Release Summary

The FDMS.gov Beta version 4.4 release provides users with additional functionality including the introduction of Bulk Import and Advanced Search Functionality. The primary changes to FDMS.gov Beta for this release include the following:

- Advanced Search

- Bulk Import

- Docket Permissions Tab

- Docket Unified Agenda Tab

- Batch Processing for Document Subtype

- Deduplication Report Enhancements

- Improvements Addressed

- Defects Addressed

Advanced Search

The **Advanced Search** functionality in FDMS can be used to perform detailed searches on Dockets and Documents. The search results view will be the same as the Quick Search results view implemented in a previous release:
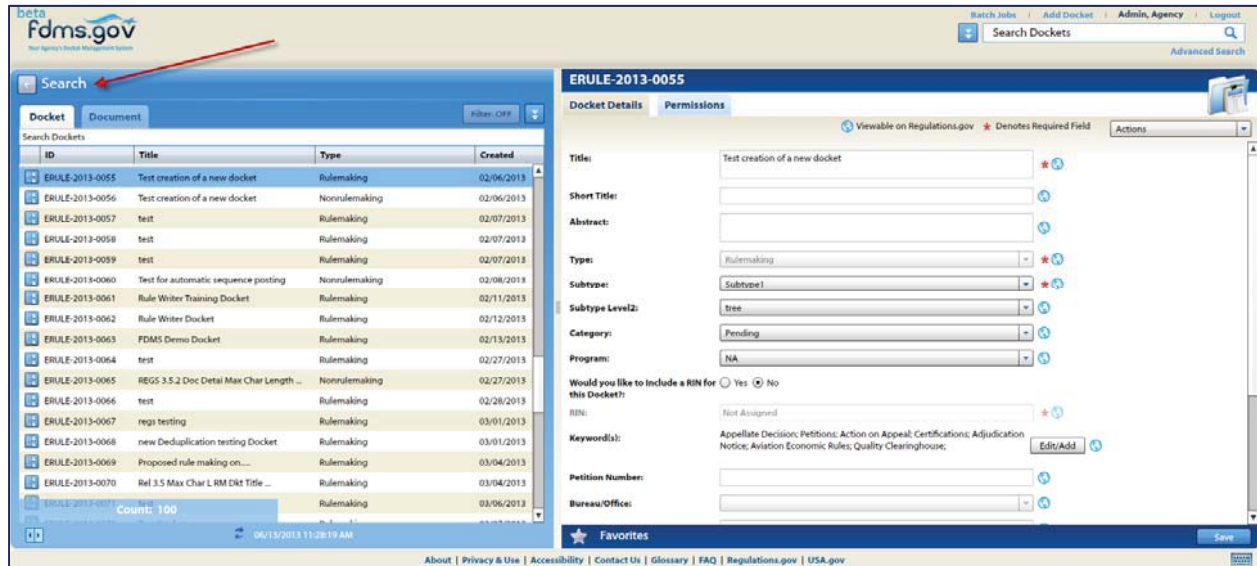

Figure 1 : Advanced Search Results

Advanced Search – Docket

Upon selecting the *Docket* radio button in Advanced Search, users have the ability to search by the following criteria:

- – Title, Abstract, Short Title
- – Docket ID, Legacy ID
- – Modified Date, Creation Date
- – Agency
- – Type
- – Subtype
- – Subtype Level 2
- – Program
- – Category
- – RIN
- – Keyword
- – Organization
- – Petition Number

Figure 2 : Advanced Search – Docket

Advanced Search – Document

Upon selecting the *Document* radio button in Advanced Search, users have the ability to search by the following criteria:

– Title, Abstract, Subject

– Document ID, Docket ID, Legacy Document ID, Federal Register Number, Original Document ID

– Posted Date, Modified Date, Comment Due Date, Comment Start Date, Author Date, Creation Date, Effective Date, Implementation Date, Postmark Date, Received Date

– Agency

– Type

– Subtype

– Status

– Posting Restrictions

– Posting Restriction Reason

– Authors

– Topics

– Submitter First Name

– Submitter Last Name

– Submitter Organization

Figure 3 : Advanced Search - Document

Bulk Import

The **Bulk Import** functionality allows users to quickly add one or multiple files quickly and efficiently. By clicking on the *Add Doc/Bulk Import* button on the Docket Tree, users have the ability to:

- Add Document: Add one Document to the Docket with or without attachments
- Bulk Import: Add more than one Document to the Docket

Figure 4 : Bulk Import

Users can create a Document with or without a file and can Bulk Import an unlimited number of files. The popup screen gives users the ability to:

– Select the type of action to complete: Add Document or Bulk Import

– Select the Document Type to add

– Include Submitter Information

– Browse for Files to Upload

    o Edit the Title of the Files
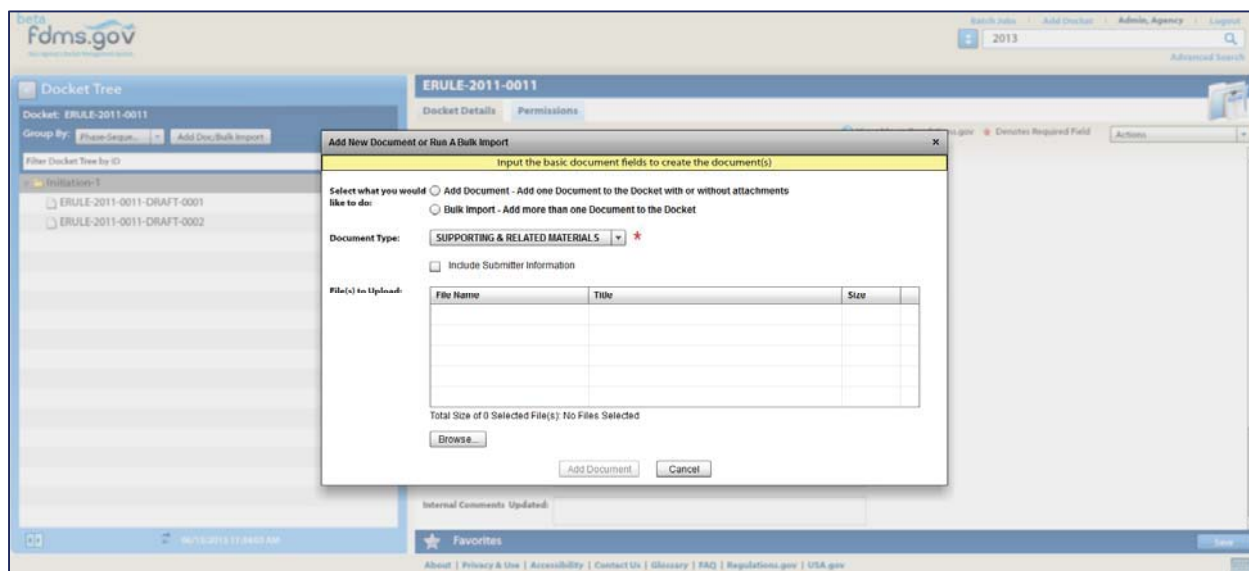
    o Remove a file from the list

Figure 5 : Bulk Import Pop Up

Please Note: *Some agencies may experience issues with larger file imports (over 100 files). If you experience any issues adding or importing documents please contact the help desk so that we may investigate further.*

Docket Permissions Tab

A *Permissions* tab was added on the Docket level. The general rules for permissions on the Docket are the following:

– Agency Administrators and Records Managers will always have write access to the Docket.

– Agency view can only have read access to the Docket.

– Users from other agencies have read access to posted items in the Docket.

In addition, users can select from the following two options:

- Use default permissions: all agency users are given permissions to access this docket
- Only grant permissions to the assigned docket manager, rule writer and individuals or groups selected
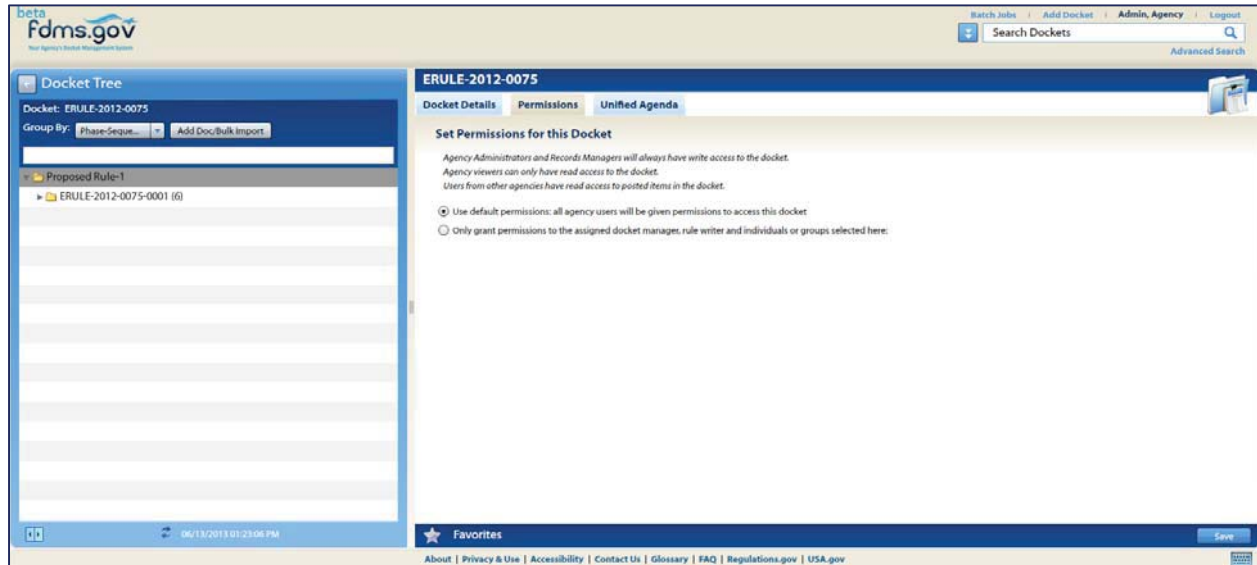

Figure 6 : Docket Permissions Tab

Docket Unified Agenda Tab

All Rulemaking Dockets with a valid RIN will have a *Unified Agenda* tab. This tab will only show for Agency Administrators and Assigned Docket Managers. The tab will contain all metadata associated with that RIN from the most recent Publication of the Unified Agenda. Users with write permissions to the Docket will have the ability to edit the following Unified Agenda fields:

- Abstract
- Points of Contact (POC)
  o ***Please Note:*** *Users may add as many POCs as desired, however on the Regulations.gov Docket Folder Summary page, only 2 POCs will be viewable. If a user accesses the Unified Agenda link on Regulations.gov, all POCs will be viewable.*
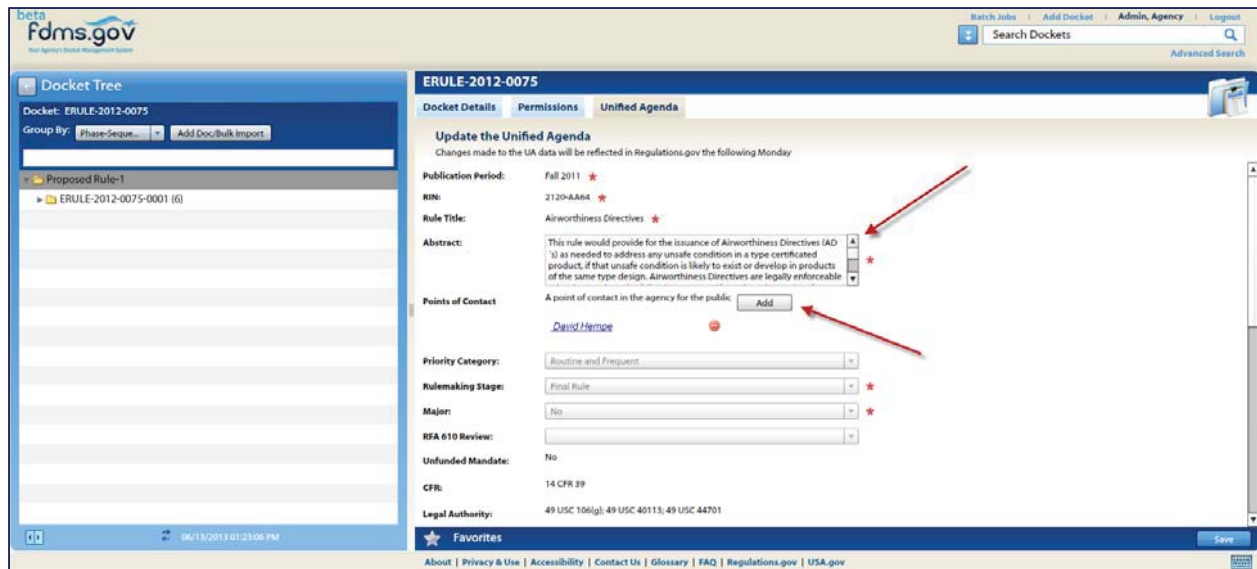
Figure 7 : Docket Unified Agenda Tab

Please Note: *Changes made to the UA data will be reflected in Regulations.gov the following Monday.*

Batch Processing for Document Subtype

In addition to the Batch Processing options implemented in the FDMS 4.3 release, users can now complete *Batch Processing for Document Subtypes* for Documents of the same Type. Users can complete this action from the Docket Tree or the Deduplication Tree.
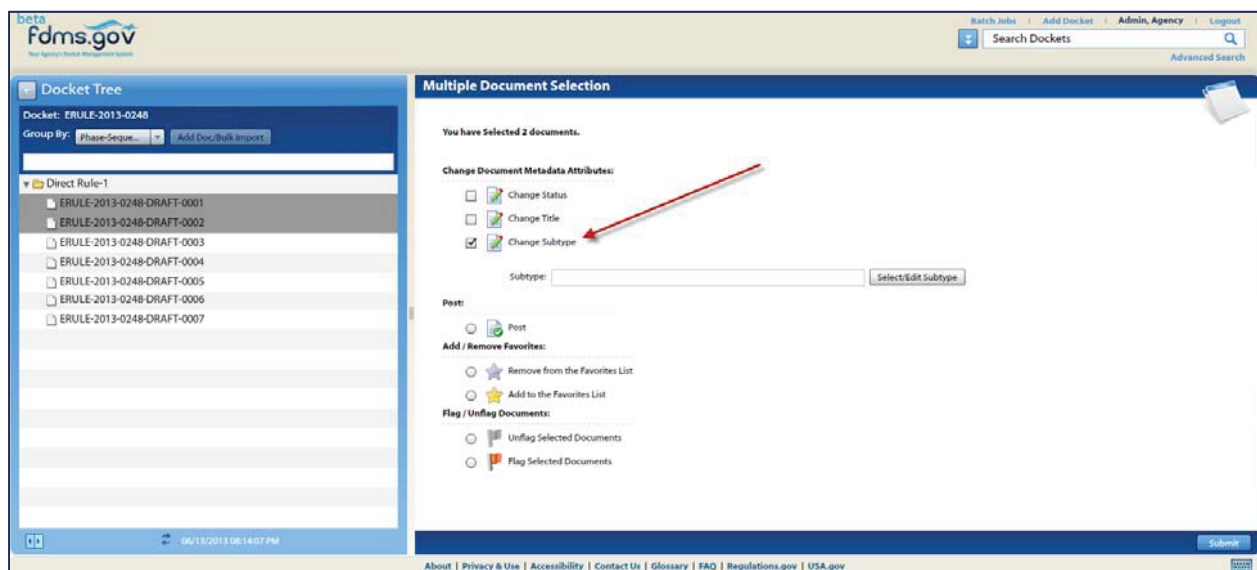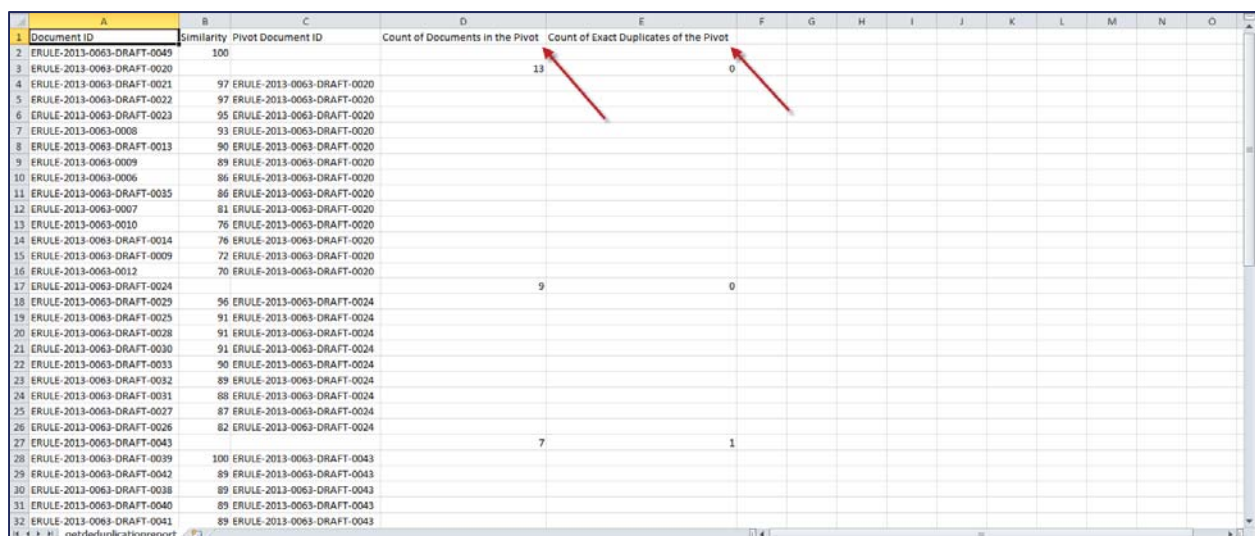

Figure 8 : Batch Processing for Document Subtype

Deduplication Report Enhancements

In order to provide users with a summation of their deduplication results, the following two columns were added to the Deduplication Report:

- – *Count of Documents in the Pivot*
    - o Provides users with the number of Documents that are considered near or exact duplicates of the Pivot Document.
- – *Count of Exact Duplicates of the Pivot*
    - o Provides users with the number of Documents that are considered exact duplicates of the Pivot Document.

Figure 9 : Deduplication Report Enhancements

Defects Addressed

- **Docket Tree:** Some users reported slowness or timeouts when opening large Dockets in the FDMS Beta environment.
    - o Users should now be able to open large Dockets without an issue.
- **Attachments:**
    - o Grammatical correction in Attachment Copy Confirmation
        - ▪ Correction made.
    - o Grammatical correction in Restriction Explanation field in the Attachment Tab
        - ▪ Correction made.
- **Document Details:** 'Count of Public Submissions in FDMS on this FR' was not updating
    - o Counts will now update appropriately.

- **Batch Jobs:**
  - Page was not loading when a user had 0 batch jobs.
    - Page will now load and give user a message that there are no batch jobs.
  - Title was cutting off on the Batch Item Document Details screen
    - Title will now wrap to display correctly.

Known Issues in this Release

- **Add Doc/Bulk Import:** Some users may experience issues with larger file imports (over 100 files). If you experience issues when adding or importing documents please contact the help desk so that we may investigate further.

- **Docket Tree:** Date Received view shows counts for each time period rather than a cumulative count.